



State of California

Employment Training Panel

Arnold Schwarzenegger, Governor

October 27, 2009

Jeff Goldberg, President & Owner
Cali Bamboo, LLC
9364 Waples Street, Suite D
San Diego, Ca 92121

Dear Mr. Goldberg:

RE: Final MONITORING VISIT REPORT FOR CALI BAMBOO RETRAINING SB- ET08-0222

Date of the Visit:	7/28/09
Beginning/Ending Time:	1:30pm – 3:30pm
Date of Last Visit:	8/14/08
Visit Location:	San Diego, California
Persons in attendance:	Janneke Kelly, Business Operations Manager, Cali Bamboo, LLC; Tanner Haigwood, COO, Cali Bamboo; and Suzanne Godin, ETP Contract Analyst
Action Required:	No

CONTRACT INFORMATION:

Term of Agreement:	9/29/07-9/28/09	Agreement Amount:	\$26,400
Training Start Date:	9/29/07	No. to Retain:	20
Date Training must be Completed:	6/28/09	Range of Hours:	8 - 120
Type of Trainee:	Retrainee	Weighted Ave. Hours:	60

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5353 Mission Center Road, Suite 110
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www.etp.ca.gov
ETP (04/15/05)

FINAL REPORT SUMMARY:

• AGREEMENT HISTORY

Cali Bamboo, LLC (Cali) distributes and sell bamboo building products. The Agreement was approved at the September 2007 Panel Meeting and training began on 9/27/07. Ms. Kelly reported that all training was completed on 5/15/09 which allowed for the 90-day retention period to be completed by the term ending date of the Agreement (9/28/09). ETP approved one amendment revision during the term of the agreement that extended the term ending date by 12 months and revised the range of training hours from 8 -60 to 8-120.

• INTERVIEW WITH THE CONTRACT REPRESENTATIVE, JANNEKE KELLY

Both you and Ms. Kelly reported that the ETP-funded training has had a profound effect on the way business is done at Cali Bamboo. In May 2008, Cali received the *San Diego Chamber of Commerce Small Business of the Year Award*; and in June 2009, your company received the *Ernst & Young Entrepreneur of the Year Award*. Your company's revenues have doubled from where they were at the end of 2007 when Cali began the ETP-funded training. You stated that Cali's increased revenues, and its awards and recognition from the business community, was a direct result of the Business and Continuous Improvement skills training delivered during the ETP Agreement.

You added that the training has given Cali's frontline workers the process improvement and technical skills needed to perform multiple functions and provide superior customer service to your customers. Interdepartmental communication has improved; your employees now function as a team, and understand how one individual's performance (or lack of) affects the rest of the company.

Lastly, Ms. Kelly reported that the ETP on-line record keeping system was extremely user friendly and that Ms. Godin was always available to provide technical assistance when necessary.

DISCUSSION OF PROJECTED EARNINGS:

The Agreement's training plan specified that trainees would be provided with a minimum of 8 to a maximum of 120 hours of class/lab training. 21 trainees (105% of planned retentions) completed the specified range of class/lab hours (8-120) and retention period. Cali tracked 921 eligible hours on the ETP class/lab tracking system for the aforementioned 21 trainees. Therefore, Cali is eligible to earn \$20,262 (78 percent of the encumbered amount) if all other agreement conditions are met. As of the date of this report, Cali had received \$20,195.00, of which \$18,483.00 is shown as earned. The final contract closeout invoice has not yet been submitted.

PROJECT STATUS PROVIDED BY THE CONTRACTOR:

Trainees Started Training:	22	Completed Training:	20
Trainees Enrolled:	32	Completed Retention:	20
Dropped Following Enrollment:	1	In Retention Period:	0
No. Completed Minimum Reimbursable Hours :	21		

TRAINING STATUS:

The statistical data submitted by Ms. Kelly during this visit, as detailed on the previous page, was in agreement with ETP's Trainee Status Report as of the date of this report.

INVOICES:

No additional invoices had been submitted since the previous monitoring visit as of the date of this visit. Invoice number 3 (Progress Payment 1 (enrollment) and Progress Payment 2 (completion of training) for 13 trainees; and Invoice number 4 (final payment) for 19 trainees; were submitted subsequent to the final monitoring visit.

Ms. Kelly was advised that the fiscal closeout invoice should be submitted no later than 30 days after the end term date of the Agreement, which is 10/28/09. If you are unable to submit the closeout invoice by that date, a request for an extension must be submitted to ETP's Fiscal Unit Manager, Kulbir Mayall.

ATTENDANCE ROSTERS:

Attendance Rosters reviewed:	8/15/08-5/15/09	Rosters reviewed contained all the required information per Title 22, California Code of Regulations, Section 4442.	YES
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SUBAGREEMENTS:

Training Vendor Subcontracts:

Training vendors performing ETP training?	Yes
If yes, is all training vendor information on file for training vendors who have provided training?	Yes
Has all vendor information been entered in the on-line ETP 100D for all vendors who have provided training?	Yes
Vendor information reviewed during meeting:	
<u>Vistage International</u> , San Diego CA - \$6,000 for the delivery of class/lab training hours in Business, Commercial and Continuous Improvement skills topics.	

AUDIT:

Cali Bamboo will be notified in writing if this agreement is selected for an audit that will be conducted either at your site (field audit) or by telephone if selected for a desk audit (or "review"). These notifications will be sent in advance to allow ample preparation time and will include a list of documentation that will be examined by the auditor. A list of the documentation typically examined during an audit will be included along with the Audit Notification and Audit Confirmation letters. To provide support of training, original training attendance documentation is required; photocopied records are not acceptable.

Listed below are types of records typically requested during an ETP field audit:

- Training attendance records such as rosters, sign-in sheets, etc.
- Payroll records of individual trainees to verify wage and hours worked
- Personnel records regarding occupation and dates of employment
- Documentation of employer paid health benefits (if applicable)
- Cash receipts to verify receipt and accounting of ETP funds

RECORD RETENTION:

Records must be retained within your control and be available for review at your place of business within the State of California. This responsibility will terminate no sooner than four (4) years from the date of the termination of the Agreement or three (3) years from the date of the last payment by ETP to the Contractor, or the date of resolution of appeals, audits, claims, exceptions, or litigation, whichever is later.

If you have any questions or comments regarding this report, please contact Suzanne Godin at (619) 686-1918 or at sgodin@etp.ca.gov within ten (10) working days from the receipt date of this letter.

Sincerely,

Diana Torres, Manager
San Diego Regional Office



Suzanne Godin, Contract Analyst
San Diego Field Office

cc: Janneke Kelly, Business Operations Manager, Cali Bamboo (via e-mail)
Tanner Haigwood, COO, Cali Bamboo (via e-mail)
Kulbir Mayall, Fiscal Manager
Master File
Project File